



The
American
Gift Fund

Quick Reference Guide for Financial Advisors and Client Associates

Creating a login

1. Enter the following URL in a browser: www.giftfund.org
2. Select the 'LOG IN' Button at the top of the screen
3. Select 'DONOR-ADVISED GRANT PORTAL' (See Example #1)
4. Select 'Create a Login' (See Example #2)
5. Fill out the fields presented on the form, then select 'CREATE LOGIN'.

Grant Recommendations

1. Once logged into the Donor-Advised Grant Portal, select 'Make a Grant'.
2. Select 'Select Another Account'. Choose the correct account. (See Example #3)
3. Select 'ADD NEW CHARITY' (See Example #3). Enter the Tax ID# or name of the charity. Choose the correct charity from the listing by selecting 'Select'. The screen will populate with the charity information.
4. If you have additional charities to add, select 'ADD NEW CHARITY' again and select the correct charity. Once you are completed adding all the charities, select 'CONTINUE TO NEXT STEP'.
5. Enter the amount of each grant. The minimum grant recommendation is \$250.00. Select a distribution option (Lump Sum, Monthly, Quarterly, Annually).
 - Lump Sum= One Time grant, not recurring
 - Monthly/Quarterly/Annually= Recurring Grant, will automatically be processed by an AGF Team member each Month/Quarter/Year until the AGF Team is instructed to put a stop to this donation.
6. Select the purpose of the grant using the drop down. (See Example #4)
 - General – General Fund
 - In Memory of –
 - In Honor of –
 - Acknowledging the Missionary Work of –
 - Specific Program/Department –
 - Other –
7. Review the details on the Confirmation Page and ensure all information is accurate. If any changes need to be made click 'Go Back' and make the proper changes.
8. If the donor advisor wishes to receive an acknowledgment letter from the charity, please contact the charity directly.
9. Select the box to agree to the statements.
10. Select 'AGREE AND SUBMIT GRANT REQUESTS'. (See Example #5)

Grant History

1. This section keeps track of all the grant recommendations that have been submitted.
2. This section is sortable using the dates, search field. (See Example #6)
3. Please note the 'Status' column. You can check this section at any time to check the status of the grant recommendation. (See 'Grant History Status Key' below.)

Grant History Status Key

STATUS	Description
Submitted	The AGF Team has received your grant recommendation.
Researching	The AGF Team is reviewing charitable organization information.
Declined	The grant recommendation has been declined.
Quality Review	The AGF Team is conducting a quality review of the submitted grant recommendation.
Awaiting BOD Approval	The AGF Team has completed the review and prepared for Board of Directors approval.
More Info Needed	The AGF Team is verifying necessary information for this grant recommendation.
Closing in Process	The AGF Team is completing final closing steps.
Processing Check	The Board of Directors has granted approval and the AGF Team is preparing the check and grant letter.
Complete	The check has been mailed. (a copy of the letter can be viewed in 'My Documents')
Funds Needed	Funds for grant disbursement require transfer from investment account to disbursement account, by financial advisor.
Funds Available	The AGF Team has received the funds to cover the grant recommendation.
Canceled	This grant has been canceled per request from the Donor, FA, or CA.
Raise	(if applicable) Liquidity of internally held funds required, the AGF Team will complete.

Successor Advisors

1. This section is for selecting a successor donor advisor that will have the authority to recommend grants after the death of the Donor Advisor(s). (See Example #7)

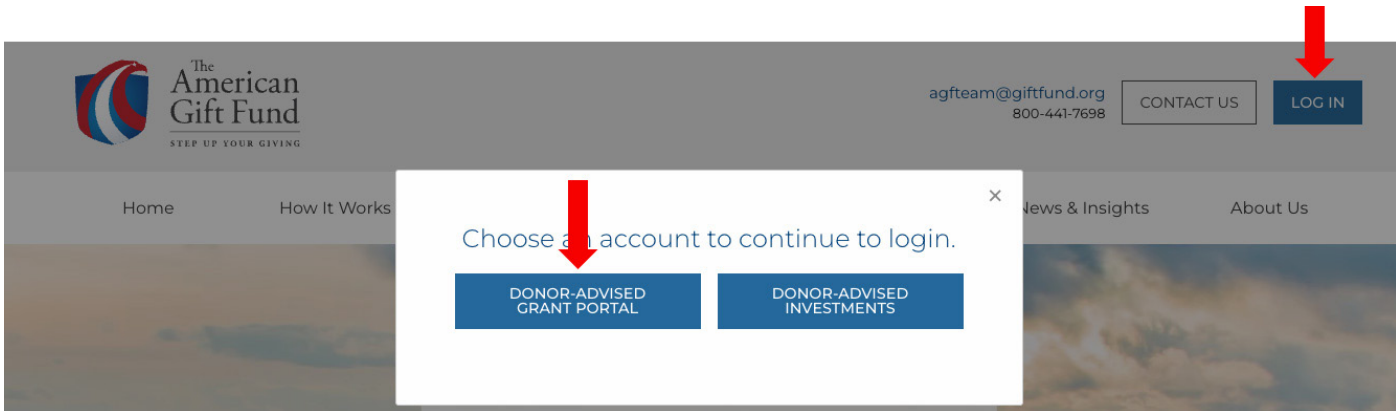
My Documents

1. This section contains copies of the letters sent to charitable organizations of approved grant recommendations and tax gift receipts for contributions to the American Gift Fund. (See Example #8)

Grant Recommendation Process

1. A grant recommendation is submitted via the 'DONOR ADVISED GRANT PORTAL' on www.giftfund.org.
2. The Donor Advisor(s) (and designated representative if applicable) will receive an automated email confirming that the AGF Team has received the grant recommendation.
3. The AGF Team will perform the necessary research and ensure BOD approval.
4. The AGF Team will email the Financial Advisor to send the funds via ACH to the CNB banking instructions on file. To ensure timely disbursements, funds to cover approved grants should be received by Wednesday morning at 10:00 AM (EST). Funds received after this time will be disbursed the following week.
5. Approved charity organization checks are normally disbursed weekly and mailed by end of day Friday.
6. The status of the grant recommendation(s) may always be reviewed by logging into the Donor Advised Grant Portal and selecting 'Grant History'. A status of 'Complete' indicates that the grant recommendation has been approved and mailed to the charitable organization.
7. Once the status shows 'Complete', you may select the 'My Documents' tab within the portal. Copies of the grant recipient letters sent to charitable organizations of approved grant recommendations will now be loaded directly into the 'My Documents' section.

Example #1



Example #2

Log in to your American Gift Fund Account

Username

Password

LOGIN

[Create a login](#) | [Forgot Password?](#)

Create a log in for your American Gift Fund Account

AGF Account Number

Which are you?

Donor

Financial Advisor

Client Associate

Your First Name

Your Last Name

Your Email Address

Username

This username is in use, please choose another.

Password

Confirm Password

Passwords do not match.

CREATE LOGIN

Example #3

Make a Grant Grant History Fund My Account Succession Plan

Smith Family Fund [SELECT ANOTHER ACCOUNT](#)

Account #00000001234
Value as of 01/27/21: **\$2,000.00***
* Account Balance may not reflect current transactions

Request a grant to a qualifying charity.

[ADD NEW CHARITY](#) [ADD A CHARITY TO CONTINUE](#)

Please ensure you have selected the correct account.

Example #4

Make a Grant

To: American Cancer Society, Inc.

Grant Amount:
Minimum \$250.

Contact Person: (optional)

Contact Phone Number: (optional)

Purpose of Grant:

Grant Purpose will be printed on the grant letter.

Choose from one of the following options.

- Lump sum, one-time grant
- Annually Recurring
- Quarterly Recurring
- Monthly Recurring
- Pay % of account value annually

Example #5

Need make a change? [Go Back](#) 

Agreement

- I have read the [American Gift Fund Disclosures](#).
- I will not receive goods, services, or impermissible benefits as a result of this grant(s). Examples of impermissible benefits include memberships, tickets to charity event, pledges, and other items which have monetary value.
- I understand that I should disregard any charitable gift receipt I may receive from the charities listed above as a result of this grant(s) as I was already provided one at the time of contribution to my DAF.

I agree to the statements above.

Grants can only be made to IRS-qualified public charities that are exempt under section 501(c)(3) of the Internal Revenue Code.

[AGREE & SUBMIT GRANT REQUESTS](#)

Example #6

[Make a Grant](#)

[Grant History](#)

[Fund My Account](#)

[Succession Plan](#)

[My Documents](#)

Test Account Fund

Account #00000001234

Value as of 01/27/21: \$2,000.00*

* Account Balance may not reflect current transactions

Grant History

Showing grant requests initiated with this system

From:

mm/dd/yyyy



To:

mm/dd/yyyy



Search by charity...

[EXPORT HISTORY](#)

Example #7

Grant Grant History Fund My Account **Succession Plan** My Docu

DAF Succession Plan Change Form

Use this form to update the successor options of your Donor Advised Fund. By completing and submitting this form, your selections will replace any existing successor options currently on file.

Choose a Succession Plan ?

Choose what will happen to your Fund when all Donor Advisors named in Step 1 are unable or unwilling to act in that capacity.

- Option 1:** Pass current Fund privileges to others. Retain the assets in your Fund and appoint up to two Successor Donor Advisors.
- Option 2:** Establish recurring grants to charities. Recommend annual recurring grants based on a percentage of the fund's balance.
- Option 3:** Transfer assets to the Board of Directors Philanthropic Fund.
This Fund is managed by our Board of Directors and used to grant to a variety of charitable causes.

The American Gift Fund's Board will have ultimate control and governance responsibility for all aspects of the Fund. The American Gift Fund shall have the power to modify any restriction or condition on the distribution of funds for any purpose or to any organization that is set forth herein or in any other document in connection with the Fund if, in the sole judgment of the American Gift Fund, any such restriction or condition becomes unnecessary, incapable of fulfillment, or inconsistent with the charitable needs of the non-profit community.

SUBMIT

Example #8

Grant History Fund My Account Succession Plan **My Documents**

NAME	DATE	
Document-name.pdf	6/7/22	DOWNLOAD